

Organizing Your Financial Records

Use this worksheet as a guide when organizing your finances.

Financial Record General Category	Specific Items Within Category	Filed	Lockbox	Safe Deposit
Automotive/Recreational Vehicles				
Bank Accounts				
Credit				
Employment				
Insurance				
Medical Records				
Personal				

Notes: _____

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Continued...

Financial Record General Category	Specific Items Within Category	Filed	Lockbox	Safe Deposit
Residence				
Retirement Savings				
Schools				
Social Security				
Taxes				
Warranties and Receipts				
Wills and Trusts				

Notes: _____
